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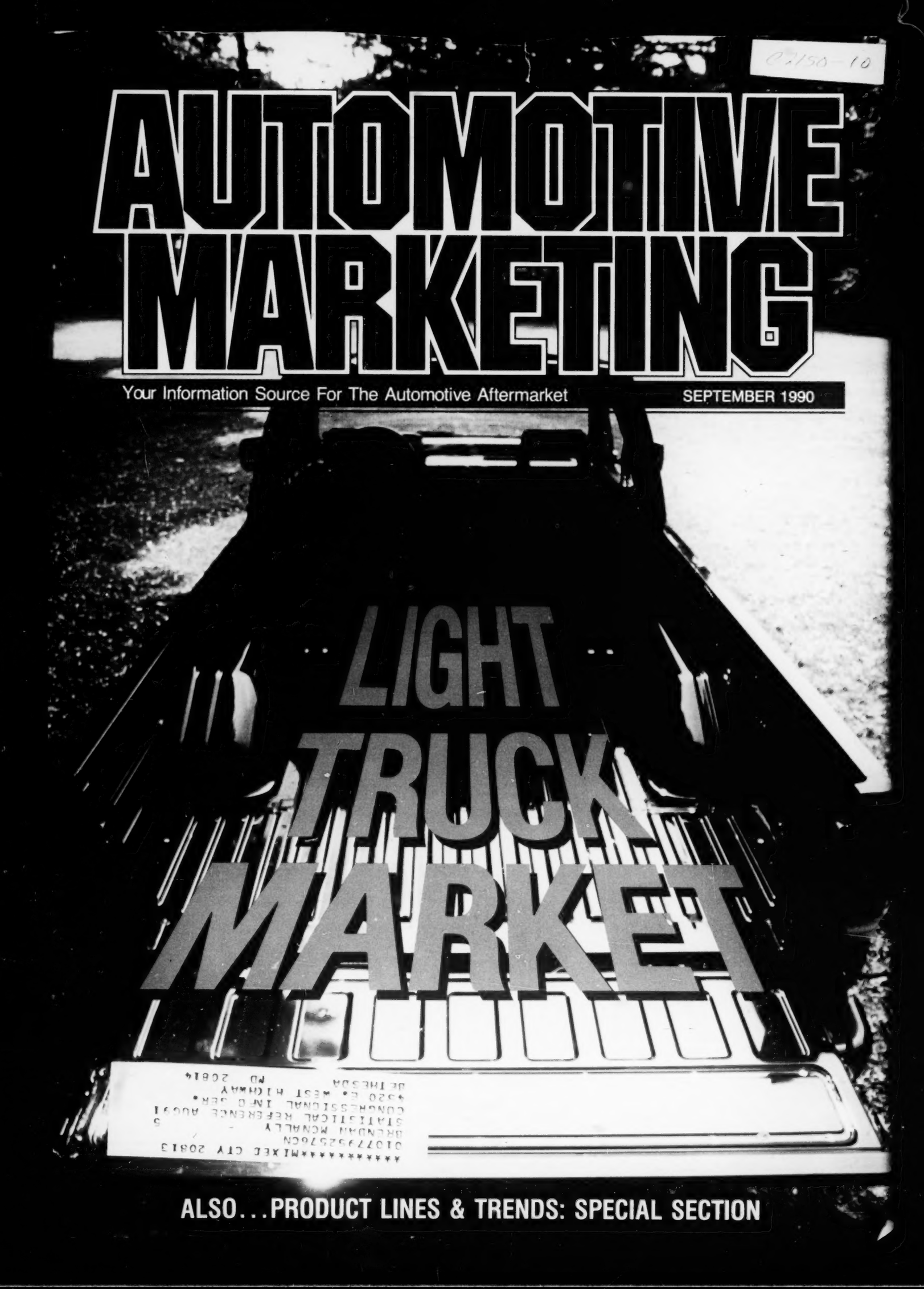

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1990 Sept Vol 19, No 9

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MARKET LINE

TRADE SHOWS

ASIA/MEMA/SEMA Team Up In Vegas. How It Happened.

The May 10 announcement that the Automotive Service Industry Association (ASIA), Chicago; Motor Equipment Manufacturers Association (MEMA), Englewood Cliffs, NJ; and the Specialty Equipment Market Association (SEMA), Diamond Bar, CA, would hold their shows concurrently in Las Vegas came as a surprise to some in the industry. ASIA and MEMA co-sponsor the Big "I" Show and SEMA sponsors the joint SEMA/Auto Internacional Show annually.

Most talk of show consolidation centered around a joint Automotive Parts & Accessories Association (APAA) and Big "I" Show. However, SEMA, MEMA, and ASIA had been discussing various cooperative efforts for some time. Actual discussions of a side-by-side show began with a conversation last summer between SEMA president Chuck Blum, and ASIA president John Nerlinger.

"We started talking to SEMA about their participation in Automechanika and other European Shows," Nerlinger remembered. "And, after several meetings, it seemed like a good idea. At the same time, we had been talking about a side by side Eastern Show with SEMA for over a year."

And one day, Nerlinger casually asked Blum whether he'd ever thought of holding the SEMA show side by side with the Big "I" show.

"No, I really haven't," Blum said to Nerlinger.

"Well, maybe we ought to talk about it," Nerlinger said.

"I'll get back to you," Blum said.

"When I brought it up to the SEMA Board, a lot of heads came up," Blum told *Automotive Marketing*. "In all honesty, nobody had ever even considered it. But the more we thought about it, it started to make sense. So, the Board told me it wouldn't hurt to talk about it some more."

So Blum, Nerlinger, and MEMA president Bill Raftery all met again during last

APAA SHOW

Buyer Registration Up; Toll Free Registration Open

The 1990 Automotive Parts and Accessories Association (APAA) Show, which will run from October 23-25 in Chicago's McCormick Place, is about a third of the way toward its expected 10,000 automotive buyers, according to APAA Show Committee chairman James Minarik of Sparkomatic Co., Milford, PA.

Minarik said the strong buyer registration confirms that the APAA Show is the show of choice for automotive retailers and mass merchandisers. Being the only aftermarket show in Chicago in 1990 is one reason traditional buyer attendance will be higher in 1990 than in 1989, Minarik added.

The APAA is offering buyers and all those wishing to pre-register the chance to do so by phone until early October. A toll free call to APAA 1990 at 800-654-0532 will simplify registration, avoid waiting in line at McCormick Place, and eliminate a $10 on-site registration fee.

Registration is available from 9 a.m. to 5 p.m. (CDT), Monday through Friday.■

SHOW SCHEDULE: 1990-1994

1990

Date	Event	Location
October 10-12	SEMA/AI	Las Vegas
October 23-25	APAA	Chicago

1991

Date	Event	Location
February 26-28	Big "I"	Chicago
October 7-10	APAA	Chicago
November 20-22	SEMA/AI	Las Vegas

1992

Date	Event	Location
April 7-9	Big "E"/SEMA East	Atlanta
October 1-4	APAA	Chicago
November 18-20	Big "I"/SEMA/AI	Las Vegas

1993

Date	Event	Location
February 23-25	Big "E"/SEMA East	Chicago
October 18-21	APAA	Chicago
November 17-19	Big "I"/SEMA/AI	Las Vegas

1994

Date	Event	Location
April 19-21	Big "E"/SEMA East	Atlantic City
October 17-20	APAA	Chicago
November 16-18	Big "E"/SEMA/AI	Las Vegas

Source: *Automotive Marketing* from APAA, ASIA, MEMA, SEMA

November's Automotive Warehouse Distributor Association's (AWDA) Conferences in Las Vegas. "The more we talked, the more viable it got," Blum said.

A Long Relationship

The new negotiations were building on the basis of an established relationship. The relationship began in April 1987 at the first SEMA East Show, held on Piers 88 and 90 in New York City. The show did not do as well as expected. Heavy rains, almost a monsoon for those of us who went, held total attendance to 5,320. Even Blum called it a disaster. Raftery, MEMA president, recalled that he chatted with Blum at that show and "we kept talking. That ultimately led to more discussions."

The upshot of the discussions was that SEMA wanted jobbers, and the Big "E" had jobbers. And the Big "E" could use the exciting products and suppliers, things SEMA could deliver.

Shortly after the New York Show, Blum phoned Gary Showalter, vice president and managing director of Hall-Erickson, Clarendon Hills, IL, the managers of the Big "I" and Big "E" Shows, and inquired about the prospect of SEMA East combining with the Big "E" show scheduled in Atlantic City, NJ, in April 1988.

"After Chuck called," Showalter said, "I brought it up to the JOC (the Joint Operating Committee that runs MEMA/ASIA events). But, unfortunately, due to the limited facilities in Atlantic City, we couldn't get it done. The Big "E" needed 140,000 square feet and SEMA needed about 40,000 additional feet. And the only space available, frankly, was such poor space I couldn't offer it. It's only a hall on the lower level. Basically, it's a garage. It floods during bad storms.

"But, we said, let's not forget the idea. So we talked about doing it in Philadelphia in 1990. But the space was still too small. Then we started pursuing Atlanta in 1992. Our committee said yes, and so did the SEMA Board. So I booked additional space. That was 1988 when I blocked out space in Atlanta for 1992."

APAA Ad Hoc Committee

While the joint ASIA/MEMA/SEMA negotiations continued, an entirely different group of negotiators started up an APAA ad hoc committee chaired by Jim Thomas of Maremont, Chicago, that was set up in 1988 to examine show consolidation.

"We got some discussion started," Thomas said. "And once the genie was out of the bottle, it was hard to control. In December 1988 we convened another meeting in Chicago. John Reiss of the JOC and Jack Giebe of ASIA were there. There were 12 to 14 people there. No trade press was invited. We wanted to talk about what we needed to do to have a combined show. In our discussions, there were as many opinions as there were people. After the meeting, I put out minutes summarizing the various positions and we met again in March 1989.

"At that meeting, we only had seven or eight people. But they were all big companies. A power base. At that meeting it was suggested that rather than act on an ad hoc basis, we try to get MEMA involved in the discussions. There were several phone calls and letters to MEMA and they said basically, we'll get back to you. During 1989, I had numerous conversations between chairmen and board members of MEMA, SEMA and AWDA, but none in

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public."

While these ad hoc discussions continued, the talks between staff members of MEMA, ASIA, and SEMA continued planning the 1992 joint Big "E" and SEMA East Show in Atlanta.

Then in July 1989, when APAA was a little late deciding whether or not it would co-sponsor a pavilion at the German Automechanika, SEMA opened discussions with ASIA, MEMA, and the Overseas Automotive Club.

"We felt SEMA manufacturers deserved an opportunity to exhibit overseas, but SEMA was not financially able to deliver a pavilion by itself," Blum said. "So in August we started talking to ASIA, MEMA, and the Overseas Automotive Club about joining with their organization (the IASC) that does exhibits in Europe."

SEMA's joining the ASIA/MEMA pavilion provided one more link between the three associations.

Town Meeting

About the same time, August 1989, Thomas chaired a town meeting at the APAA show to publicly discuss consolidating trade shows. About 200 attended, and eight representatives of all segments of the industry spoke. Thomas staged an impressive display of documentation on exhibitor overlaps between the three major shows. Simply put, APAA exhibitors accounted for 14% of the space at SEMA and 48% of the space at Big "I." Thus, the logical pairing, which virtually all who attended agreed on, was Big "I" and the APAA.

"I don't know what you heard at that town meeting," Blum said to *Automotive Marketing*, "But I paid attention, and what I heard had an impact on me as president of SEMA. It was very clear, APAA didn't want to do a show with us, they wanted to do a show with ASIA and MEMA."

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TRADE SHOWS THROUGH THE YEARS

This chart shows the number of exhibitors and booths for the three major trade shows over the past five years.

Exhibitors

Year	APAA	Big "I"	SEMA/ AI
1986	1,010	721	811
1987	1,066	801	863
1988	1,002	760	1,019
1989	920	686	1,142
1990	(Oct.)	689	(Oct.)

Booths

Year	APAA	Big "I"	SEMA/ AI
1986	2,800	2,110	2,096
1987	2,963	2,330	2,329
1988	2,838	2,306	2,910
1989	2,625	2,058	3,161
1990	(Oct.)	1,930	(Oct.)

Source: *Automotive Marketing* from APAA, ASIA, MEMA, SEMA

Blum said he also spoke with some "key" APAA Board members in private and they said they would not be interested in talking about another combined APAA/SEMA show. "So? Where else do we go?" Blum asked.

There were several meetings between the three chairmen in November and December. "The idea really just evolved," Raftery said. "Nobody was pushing it. No arrangements were made until we got serious. We held top staff meetings and as soon as we got down to serious planning,

we brought in the volunteer leaders."

"The more we got thinking about a joint Big "I" and SEMA," Gary Gardner, director of planning and quality for automotive products, Du Pont Co., Wilmington, DE, said, "The more we thought, why not expand the whole thing? And that's when it really got complicated: space dates, reservations, our contract with PAS (Pacific Automotive Show). We thought we had it done, but then we really had to talk for a long time."

Two Negotiations

So now it's late 1989, and two unrelated groups are discussing combined shows. One with words and one with contracts. As reporters, we should have been suspicious when we saw SEMA and ASIA and MEMA staff people together at the SEMA Show in Las Vegas, and again later in February at the Philadelphia Big "E." Several staff members commented off the record to us then that SEMA was working to combine the SEMA East Show with the Big "E" show.

Although all three associations speak of regard for one another, lack of personality problems, and the synergies between SEMA and the Big "I," what really makes the two groups viable is the disparity between SEMA and ASIA/MEMA.

According to Showalter's data, the overlap in exhibitors between the Big "I" and SEMA Shows is only about 6%. About 80 companies. Almost none. With virtually no overlap, a Big "I"/SEMA show will not compete for exhibitors the way a side-by-side APAA/Big "I" Show would compete.

And make no mistake about it, money is a major factor. At $1,200 (APAA), $1,300 (SEMA), to $1,500 per 10x10 booth, the shows represent a major part of association's revenues. In 1989, APAA sold 2,625 booths, the Big "I" sold 2,058 booths, and SEMA sold 3,161 booths.

The planners for a concurrent Big "I"/SEMA Show expect a record number of buyers. "SEMA gets 15,000 buyers and we get 12,000 buyers," Nerlinger said. "So it's conceivable that we'll see 27,000 buyers in Las Vegas. It looks very reasonable. Exhibitors going to our show will have people going through the aisles that are not presently handling their lines. And, conversely, SEMA will have new buyers in their aisles. Both groups of buyers will have access to things that they have not considered before."

Resolution Time

Just about the time the ASIA/MEMA/SEMA members got down to putting their plans into contracts in January 1990, the APAA board of directors approved a resolution calling for just such a side by side show.

"The APAA is in favor of holding the APAA Show side-by-side with the Big "I" Show and any other industry trade event(s) that wish to participate," the Board said in a press release.

Speaking at a press briefing held in Chicago in March, APAA 1990 Show Committee Chairman James E. Minarik, Sparkomatic Corp., Milford, PA, said that the exhibitor overlap was greatest between the APAA and Big "I" Shows rather than APAA and SEMA, so APAA felt that the former are the two shows which might be most logically held at the same time.

" The bottom line is that APAA's position is now perfectly clear and unambiguous. We prefer and plan to have our show in the fall in Chicago which is when and where our members have clearly stated they want our show. In addition, we would welcome, and indeed would like to

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have, both SEMA and the Big 'I' Shows join us in Chicago in the fall and we have now contacted both SEMA and Big 'I', formally and informally, to express our position," Minarik said.

Whether or not other associations were contacted seems open to discussion. At the February Big "E" Show in Philadelphia, a full month after the APAA announcement, both Blum and Showalter told *Automotive Marketing* they had not been contacted by anyone from APAA. And Bill Raftery told the *AutoParts Report* that no one had contacted MEMA. However, Thomas did contact the elected heads of ASIA, AWDA, MEMA and SEMA in February.

Effects Of Clean Air

Thomas scheduled another ad hoc meeting with the elected heads of MEMA, ASIA, SEMA and AWDA for March 20, 1990 in Chicago. The meeting was to try to work out the differences between associations that had occurred over the Clean Air Act and the coalition formed to lead the aftermarket's fight against a proposed 100,000 mile warranty. Without getting into a lot of disheartening detail, the legislative struggle finally ended with APAA, SEMA, AWDA, and ASA supporting the eventual winning bill and MEMA and ASIA going down to defeat with the OE car makers.

"There was a lot of publicity about the division on the approaches to the Clean Air Act," Thomas said. "It was a very visible division. There were a lot of things said and unsaid. But I felt we should continue to talk. Let's find out about things we can talk about."

A week before March 20, the heads of MEMA, ASIA, and SEMA said they could not attend the meeting. "The next thing I knew," Thomas said, "It was May 10 and they were announcing the joint shows in Las Vegas. While we were meeting and moving forward in our ad hoc committees, there were other discussions not involving APAA. Those are facts."

The MEMA/ASIA/SEMA negotiators were all pledged to secrecy. "We were pretty well along by the time all that stuff appeared," Gardner said of the APAA releases. "Negotiations were really complicated. We already had five associations involved. Jim Thomas tried to get us all to sit down, but we knew it was so close. We were afraid the whole negotiation would blow up in our faces. We all felt very bad for Jim. But we were so far over the edge of the precipice."

Side By Side Shows

And, on May 10, Gardner, Reiss, and SEMA chairman Michael Warn held a press conference to announce that starting in 1992, the Big "I" and SEMA shows would run concurrently in Las Vegas. The SEMA, ASIA and MEMA leaders also announced a schedule of SEMA East and Big "E" joint shows through 1995.

APAA president Julian Morris said that the ASIA/MEMA/SEMA announcement came as a complete surprise to APAA. "We never heard until May 10. It was a well-kept secret."

At a June 28 meeting, the APAA Board of Directors called the action by ASIA/MEMA/SEMA "regrettable and, even more (regrettable), the manner in which it was taken that excluded APAA and its membership from the process." Some Board members wanted to make the language stronger.

APAA's position is that show consolida-

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MARKET LINE

tion remains to be accomplished. There are still three shows, though two will be held together. With the combined annual Big "E"/SEMA East show, buyers must attend four shows annually.

Morris told *Automotive Marketing*, "There's still a big component missing if there're only two components together. What's missing is APAA. Show consolidation means three components. So, we will continue to work on show consolidation." As to with whom, Morris noted that it was still possible to hold a joint Big "I" and APAA Shows in Chicago in fall 1991.

The ASIA/MEMA/SEMA position is that while the new show schedule may not be show consolidation in a strict sense, at least they've reduced the number of trips a buyer has to make to see all three major shows from three to two: Las Vegas for Big "I" *and* SEMA/AI, and Chicago for the APAA. The Big "E"/SEMA East show is a regional show for those unable to travel to Las Vegas.

In the meantime, the JOC for the new "Super" Show announced that it hopes that AWDA will hold its conferences during the Automotive Aftermarket Industry Week. Rosemary Hall, AWDA's director of meetings, said the association was currently "trying to work out the logistics. We need 200 or so suites."

The JOC is also trying to put together an AWDA-like program of conferences between suppliers and retailers for the show week.

About the only organization left out seems to be the Pacific Automotive Show (PAS), which had sponsored the Big "I" Show every other year in Las Vegas. However, a spokesman at PAS said that PAS would continue its regular February schedule of shows. The next is scheduled in Anaheim, CA, in February 1991. ■

GOVERNMENT AFFAIRS

APAA Charges Act Has Monopolistic Intent

During June hearings held by the U.S. Congress Subcommittee on Courts, Intellectual Property, and the Administration of Justice, the Industrial Design Anti-Piracy Act of 1989 came under strong attack by Julian C. Morris, president of the Automotive Parts and Accessories Association (APAA), Lanham, MD.

According to Morris, the act "cuts at the heart of the aftermarket parts and repair industry which Congress otherwise has steadfastly sought to preserve. We strongly urge its defeat."

Morris charged that the broad scope of the legislation, permitting a ten-year copyright on nearly any industrial design which is original and distinctive, would provide car companies with an "unprecedented and unwarranted extension of control from the original design of the vehicle to the sole production and distribution of replacement components for that vehicle," according to Morris.

"While APAA has always supported strong copyright and patent protection," Morris said, "Car companies could use broad design protection to claim ten-year dominion over replacement parts for every vehicle that rolls off the assembly line. Moreover, with exclusive knowledge aforehand of future designs, a car company could reserve a myriad of design variations so that its control of the monopolized aftermarket would be airtight and any ingenuity by independents would be strangled completely." ■

Study Shows DIYers Top Off Automotive Chemicals

Motor oil is the most often topped off chemical, according to a new consumer study conducted by FloTool Intl., Santa Ana, CA. Nevertheless, over three quarters of DIYers who bought motor oil also said they top off their power steering fluid, antifreeze/coolant, and windshield solvent as needed.

The study was conducted among buyers of motor oil at auto parts stores. Motor oil buyers there were asked what types of chemicals they added as needed to their car. The consumers were not actually shown any particular products during the course of the questioning.

According to FloTool's study, 88% of consumers interviewed said they topped off motor oil as needed, while 77% added power steering fluid from time to time. Three quarters of all customers topped off their antifreeze/coolant and windshield solvent. Transmission fluid was added by 72% of motor oil buyers, while 63% added water to their batteries. Finally, 46% reported adding additives to their motor oil when topping off.

Interestingly, 78% said they had problems with spills when adding motor oil even with plastic containers, while half spilled some power steering fluid. Some 38% each spilled power steering fluid and antifreeze/coolant, while only 22% spilled battery water. ■

Spark Plugs

81%

of DIYers preferred to install their own spark plugs and other ignition parts.

40%

of spark plug and ignition product buyers shopped before their purchase.

A spark plug starts combustion of the air-fuel mixture in a gasoline engine by causing a spark at the correct instant. Not long ago, some aftermarket observers predicted that the spark plug market itself was going to lose some spark. This prediction was based on two trends.

One, engines were being downsized, so there were fewer cylinders. Four-cylinder and even 3-cylinder engines began appearing in many smaller cars. The V8, it was said, seemed to be headed the way of the dinosaur. It looked as if the V6 would have the greatest number of holes to be filled with spark plugs.

Turned out that the V8 is still very much with us, there are even V12's now making appearances, and Chrysler's new Viper sports car will probably have V10 power. All of these changes, however, seem to have equalized each other and the number of spark plug numbers stabilized.

The second trend that was going to reduce the spark plug market was the ever-increasing intervals for spark plug replacement. The factory-recommended spark plug replacement intervals have now stabilized at about 30,000 miles. Most spark plug makers recommend replacement at about 12,000 miles depending on vehicle use. Professional mechanics and other experts generally agree that most spark plugs should be changed at more frequent intervals than the manufacturer says. And, many DIYers do opt for spark plug replacement at earlier intervals than car makers recommend.

So, we haven't seen the spark plug market fall into a black hole. But, it has plateaued. According to *Automotive Marketing* estimates, the total market is about 550-million spark plugs per year. There are about another 100-million spark plugs in the motorcycle, marine, and small engine market.

While the spark plug market may not be growing by

Spark Plugs

77%

of DYERs said they purchased their tune-up parts, including spark plugs, at an automotive parts store.

65%

of DIYers studied said they install tune-up parts themselves to save money.

leaps and bounds each year, it is still a very large and important market. Spark plugs shouldn't be ignored—they're an aftermarket staple.

Our 1990 *Consumer Automotive Repair Study (CARS)* found that tune-up parts, which include spark plugs, spark plug cable, and other ignition parts, are the sixth most popular product among those surveyed. That's after vital fluids such as motor oil and antifreeze/coolant. In fact, spark plugs and ignition parts are the first "hard parts" after air and oil filters. Spark plugs are obviously a very popular do-it-yourself purchase.

And, where do DIYers buy their spark plugs? *CARS* said that a resounding 77% purchased their plugs at automotive parts stores, with discount stores a distant 11% and department stores third at 4%.

Spark plugs, as most most aftermarketers might guess, are price sensitive. Forty percent of the DIYers questioned told us that they did price shop before buying spark plugs. It follows then that when asked why they bought where they did, 52% said price. Store location at 37% and product selection at 27% were important, however.

What kinds of vehicles are these spark plugs being screwed into? Passenger cars made up the majority at 61%, followed by DIYers tuning up more than one vehicle at 19%. Light trucks made up a healthy 18% of our study. Vans and sports utilities were way down the list with only 2% each.

Number one reason for doing-it-themselves was the money-saving aspect of changing spark plugs and tuning up a vehicle. Difficulty in installing plugs and ignition parts didn't seem to be a big deterrent, as 30% of *CARS* respondents even rated the job as being easy. An even more impressive 17% enjoyed installing their own spark plugs and ignition parts! We asked DIYers if they had tune-up products installed by someone else. Most hadn't, a solid 81% install their own spark plugs and other ignition parts.

Lug Nuts - Wheel Covers

40%

of DIYers who bought custom wheel accessories or wheels bought them in auto parts stores.

28%

of DIYers who bought and installed custom wheel accessories or wheels put them on a light truck.

The easiest way to radically change a vehicle's appearance—to make a personal statement out of what a car owner drives—is by changing the OE wheels to custom wheels and/or adding wheel accessories.

Indeed, 14% of all vehicle maintainers who said they did some sort of DIY work told *Automotive Marketing* that they bought custom wheel accessories or wheels during the previous year, according to the 1990 *Consumer Automotive Repair Study (CARS)*.

Wheel accessories include such products as spinners and wheel lugs. Spinners improve the appearance of custom wheels. They come in a variety of designs and finishes, including gold-tone and polished chrome finishes, traditional and swept wing design, two-bar and three-bar and basket styles.

Wheel lugs are also an important accessory for many custom wheels. According to one leading wheel accessories manufacturer, only four SKUs of wheel lugs provide 80% coverage, so retailers need not maintain large wheel lug inventories. According to this manufacturer, the popular wheel lug sizes which should be stocked are ½-in., 12mm x 1.50, 7/16-in., and 12mm x 1.25.

Custom wheels, of course, come in a wide variety of styles and materials. These include gold-tone, polished chrome, multi-finished, and Euro-look painted. The wheels themselves can be wire or wire types or in various designs with spokes or cooling slots.

According to the *CARS*, the DIYers who buy custom wheel accessories or wheels are overwhelmingly male (82%); between 25 to 44-years-old (56%); make over $30,000 in household income annually (51%); spend one to five hours a month on automotive DIY (53%); and maintain two or more vehicles (73%). In other words, the profile of the custom wheel accessory or wheel buyer matches that of the serious DIYer to a "T."

Lug Nuts - Wheel Covers

56%

of all DIYers who bought and installed custom wheel accessories or wheels shopped around for the best price before buying.

47%

of all DIYers who bought and installed custom wheel accessories or wheels bought what they thought were the best products available.

Most of these custom wheel accessories or wheels went on cars. In all, 65% of DIYers bought these products for cars, while another 28% bought for light trucks. A total of 2% each bought for vans and sports utility vehicles.

Although 40% of DIYers who bought custom wheel accessories or wheels went to an auto parts store to make their purchases, people buy these products at a wide variety of outlets. The second most mentioned source is the familiar junkyard, where 13% of wheel or wheel accessory buyers shopped. Another 10% bought the products at discount stores, while 8% went to gas stations and 7% went to tire stores.

Given the fairly large percentage of DIYers who bought custom wheel accessories or wheels from junkyards, along with another 2% who found their buys at flea markets, it is interesting to note that 47% said they bought the best products available, while 49% said they bought "middle of the line" quality. Only 5% admitted to buying "bottom of the line" quality.

Most (56%) DIYers shopped around looking for custom wheel accessories or wheels. It's no surprise, then, that 54% said they bought the product where they did because of the price they found there. Another 29% said they bought where they did because of the selection of wheel accessories and wheels they found there.

A small group of DIYers (18%) had custom wheel accessories or wheels put on by someone other than themselves during the previous year. Of them, 31% had them installed at an auto parts store, while 20% went to a gas station, and 19% went to a specialty installation outlet.

Custom wheel accessories and wheels, then, can be a good product line to reach the serious DIYer. The key to reaching them is to stress price, product selection to please all tastes, and market coverage. ■

THE GORILLA
GRIP
ANTI-TI STEEL
PATENTED 4 WAY KEY FOR MAXIMUM AUTO SECURITY
MAKES DRIVING VIRTUALLY IMPOSSIBLE
INSTALLS EASILY ON ANY STEERING WHEEL
HIGH VISIBILITY FOR GREATER SECURITY
STRONG TOUGH HARDENED STEEL CONSTRUCTION
VINYL COVERED TO PROTECT AGAINST MARRING
(Circle 24)

Ride Control

30%

of all vehicles inspected have worn shocks or struts, but replacement is only recommended for 50% of those ride control systems.

56%

of consumers feel that safety—vehicle handling and control—is the most compelling reason to replace their ride control equipment.

According to a major manufacturer of ride control products, there are five key issues that affect the market in the 1990s. They are the movement to world-class quality standards; parts prolieration; the emergence of high growth niche markets; the expanding use at OE of certain strut suspension systems; and the growing popularity of gas-charged products.

According to another key manufacturer: "Replacement rates for ride control were just over 8% in 1989 and have been steadily declining... We are taking the lead to stabilize the market by promoting safety as a selling message and giving consumers a compelling reason to buy shock absorbers and struts."

Research indicates that 56% of consumers feel that safety—vehicle handling and control—would be the most compelling reason to replace their ride control equipment.

In addition, ride control products are a strong favorite with DIYers, particularly men.

In the 7th annual *Automotive Marketing Consumer Automotive Repair Study*, published in March, some 23% of the DIYers responding to the study said they purchased ride control products. That category includes shocks, struts, and springs. Some 12% both purchased and installed the ride control products.

Almost all of the installers were men (96%), with almost two-thirds of the installers falling between the ages of 25 and 44. Some 90% of the installers owned two or more vehicles and 51% said their DIY involvement had increased in the past year.

Price was the key in selecting where to purchase ride control products. Those who installed ride control products did so mainly to save money. But it shouldn't be forgotten that this job, for the moderately experienced DIYer, is fairly easy to do—some 23% said they installed their own ride control products because it was easy.

Ride Control

60%

of DIYers bought their ride control products for their cars, 29% bought them for light trucks.

60%

of DIYers bought their ride control products where they did because of price. 25% bought them where they did because of convenient location.

Automotive Marketing asked DIYers why they bought the ride control products, including shocks, struts and spings, where they did. Some 60% mentioned price as the first reason. Next came convenient location (25%), product selection (16%), brand name (12%), habit (10%), and helpful store (2%).

Most of the DIYers reponding to the survey said they bought the ride control products for their cars (60%). Some 29% bought them for light trucks; 4% bought for more than one vehicle; 4% bought them for a van; and 3% bought them for a utility vehicle.

When asked what quaity ride control products DIYers thought they bought, most said they bought the best available. Seventy percent said they bought the top of the line; 27% said they bought the middle of the line, and only 3% said they bought the bottom of the line.

Unlike many other products in the automotive aftermarket, DIYers did not feel the need to comparison shop for ride control products. Some 65% said they had not done any comparison shopping; 35% did compare prices.

DIYers who responded to the survey had strong reasons for installing the shocks, struts or springs themselves. Sixty four percent said they wanted to save money. Twenty two percent said it was a simple task; 15% said they enjoyed the job. Ten percent said they wanted to make sure it was done right, and 5% said they were the only person around. "I can do it myself," was the response given by 1% of the DIY installers. ■

Body Repair

63%

of DIYers who purchased body filler products bought them in an auto store, 32% purchased them in a department or discount store.

62%

of DIYers who purchased body filler products bought a nationally advertised brand.

Body repair products are a viable part of the automotive aftermarket.

Data from the 1988 *Automotive Marketing Consumers Auto Repair Study (CARS)* suggests the continuing change to thinner metals and modern body materials on new cars had affected the body filler market. The number of DIYers who purchased and installed body filler that year was down slightly.

However, there is good news with the bad. The *CARS* study suggests that the purchaser of body filler is a very serious DIYer who is often involved with a major car restoration and maintenance project, rather than being a simple vehicle maintainer.

Body filler DIYers are overwhelmingly male (88%), young (37% under 25 and 22% between 25 and 34), and make less than $20,000 annually. This suggests a young man with an older car—the auto parts store's prime customer—is the major buyer of body filler.

This type of DIYer knows what has to be done with his car and plunges ahead with the job. He's not terribly influenced by advertising when deciding to buy the products—83% said they weren't so influenced. And even

Body Repair

88%

of DIYers who purchased body filler products are male.

37%

of DIYers who purchased body filler products are under 25 and 22% are between 25 and 34.

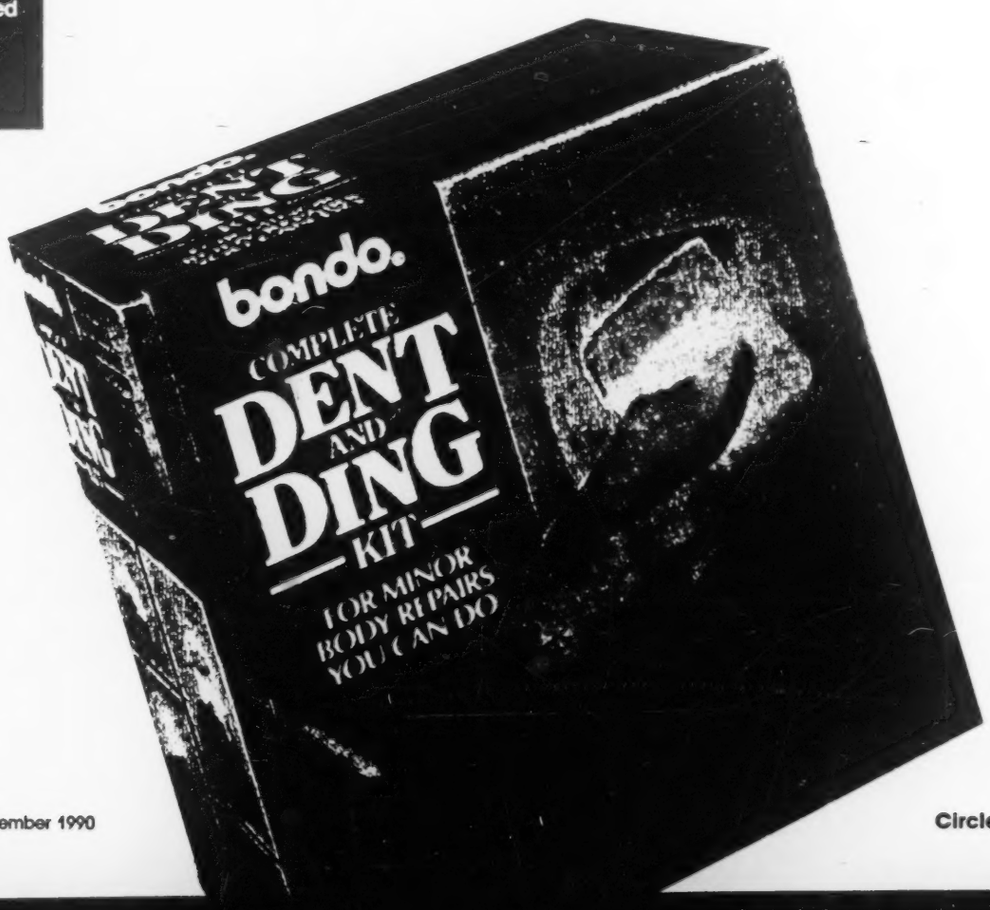
among those who did, the major media that was noticed by body filler purchasers was an in-store display. Manufacturers that provide complete body care display centers are obviously in a strong position to attract and keep this type of DIYer.

The study indicated that DIYers who did a body repair job, had already decided to buy the product (88% planned to buy it before going to a store) and were simply looking in the store for it. Also, these DIYers didn't shop around. Some 80% said they did not comparison shop for body filler. Most of them knew the store before choosing it to make the purchase.

This is verified in the answers about why they bought the product where they did. Some 31% bought body filler where they did because the store was conveniently located; another 26% said the store offered the lowest prices around. Just about the same precentage (25%) bought the type of body filler where they did because of its cheap price. More DIYers gave that as an answer for why they bought what they did than any other answer.

Body filler is an important part of a product mix that appeals to the most important single customer an auto parts or chain store can have—the young maintainer of an older car, with somewhat less income than the national average, who must spend money on his car just to keep it running, and wants it to look good.

Price, at the least the image of low price, is the key to attracting this valuable customer. And be sure you stay well stocked with the products he needs. ■



Circle 29 →

Carwashing Equipment

45%

Of car owners said they prefer to wash their cars themselves, according to the International Carwash Association.

43%

Of DIYers bought wax or polish at automobile parts stores, according to the 1990 *CARS*.

Extensive use of clear coat paints by OE carmakers may be one of the reasons why some DIYers are turning away from automated car washes and returning instead to doing the job of keeping their vehicles clean at home.

Another reason may be that those hot-selling spray attachments for garden hoses—and the add-on products such as soap and wax that go with them make the job easy and fun.

The move to keeping vehicles clean at home can be seen in several facts. First, our 1990 *Consumer Automotive Repair Study (CARS)* ranked wax and polish products fourth in both the "purchased" and "purchased and installed" categories. Some 62% of DIYers purchased and applied wax, according to the 1990 *CARS*.

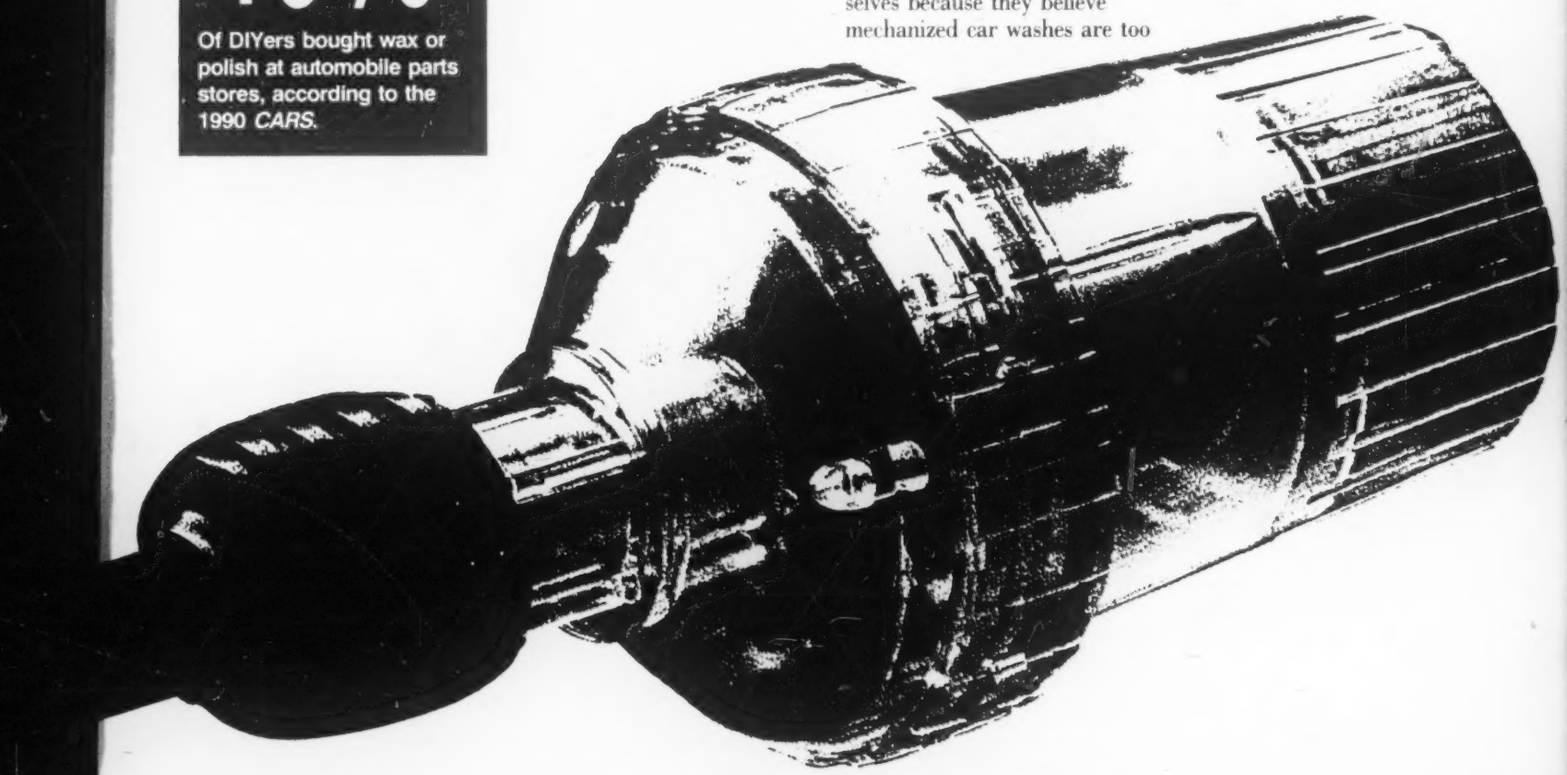
Second, the market research firm, A.C. Nielson, New York, said recently that the wax and polish market was up 5% in 1988 and up 9% in 1989. Estimates put the wax and polish market in the $180-200 million range.

Third, a 1989 report by the International Carwash Association said that 45% of car owners surveyed preferred to wash their cars the old-fashioned way—by hand, at home, usually in the driveway on Saturday morning. Those owners surveyed said they washed their vehicles themselves because they believe mechanized car washes are too expensive, do a poor job, or damage the finish.

The fact is, mechanized car washes, with stiff abrasive brushes, can scratch and mar clear coat finishes. Some new car owners' manuals even warn against brush-style mechanized car washes.

Some automated car washes have switched to "brushless" equipment. They use strips of cloth to replace brush bristles. But, as seen in the International Carwash Association survey, people believe that these brushless washes do little more than rinse off surface dirt.

But today's at-home car wash DIYers have a full range



Carwashing Equipment

49%

Of DIYers bought wax or polish where they did because of the price, according to the 1990 *CARS*.

59%

Of DIYers said they bought a top-of-the-line car care product, according to the 1990 *CARS*.

of professional style, quality car washing equipment to use. The power spray wash attachments for garden hoses—and the add-on products such as soap and wax that go with them—are increasingly popular year-round sellers in automotive stores.

These power spray washers, when used with their specially formulated cleaning products, automatically mix the proper cleaning chemical with clean water. DIYers simply spray the mix on their vehicles. The same attachment is also used to rinse vehicles and to apply specially formulated waxes from self-contained cartridge systems.

This sort of equipment makes it possible for car wash DIYers to clean and wax their vehicles as efficiently as any automated car wash without paying high prices, and without risk of damaging a clear coat finish.

So what kind of DIYers wash their vehicles themselves? It can be assumed that DIYers who use automotive wax and polish at home wash their vehicles before doing so. Here's what the 1990 *CARS* had to say about wax and polish DIYers:

Wax and polish DIYers tend to make more than $30,000 in annual household income; be between 25 and 44 years of age; spend between one and five hours a month on automotive DIY and be responsible for one or two vehicles.

Men and women tended to buy wax and polish products about equally, with 65% of male DIYers and 63% of female DIYers buying wax or polish.

When it came to applying wax or polish products, however, only 56% of women did so, while almost all the men who bought wax or polish applied it themselves.

Some 41% of wax and polish DIYers said caring for their car was a simple task, and another 28% said they did it themselves because they enjoyed it. You can bet these DIYers will enjoy using power car wash attachments, too. ■

ZOOM!

Light trucks are hot. Here are some case studies to prove it.

by **John Wirebach,**
Senior News & Features Editor

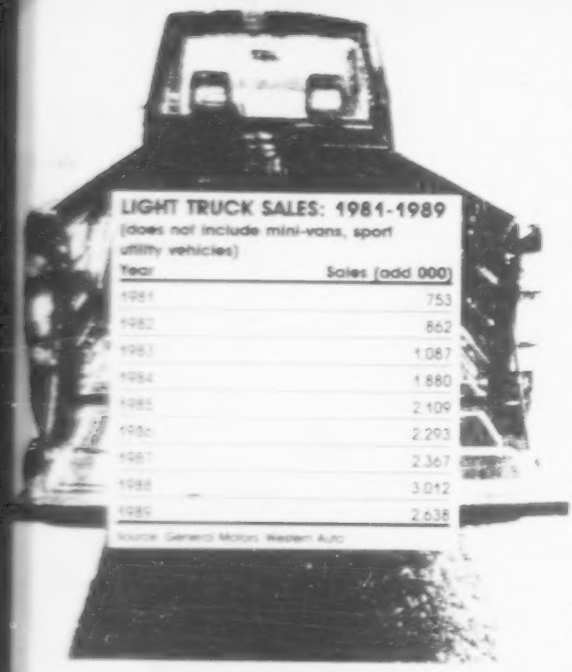
Light trucks are the biggest growth area in the aftermarket according to retailers, programmed distributors, and suppliers alike. All three segments presented case studies of why their companies got into the light truck parts and accessories business in a big way during the recent Frost & Sullivan conference.

One glance at our charts gives the main reason the aftermarket is cheering about light trucks: the light truck market is the growth market. Light truck sales are growing at an annual rate of 5.7% while passenger car sales are growing at only 1.8%.

"Between 1980 and 1989, light trucks grew from 24.2% to 29.2% of the total car park," Jim Wright, vice president, merchandising, Western Auto Supply Co., Kansas City, told the 1990 Frost & Sullivan conference. "Furthermore, the number one and number two selling vehicles in the U.S. are Ford F-Series pick-ups (588,452), and the Chevy CK-Series pick-up (489,882)."

Wright said that these positive statistics offset the other stagnant factors for the aftermarket. Among them, flat or slow growth in fleet size and miles driven, little growth in discretionary income, and an aging consumer base. "The winners of the 1990s," Wright said, "will realize the market is mature and the time is right for niche marketing."

Wright reeled off many statistics for selling light truck accessories: the Motor Equipment Manufacturers Association (MEMA), Teaneck, NJ, reports that truck owners buy 40% of total aftermar-



LIGHT TRUCK SALES: 1981-1989
(does not include mini-vans, sport utility vehicles)

Year	Sales (add 000)
1981	753
1982	862
1983	1,087
1984	1,880
1985	2,109
1986	2,293
1987	2,367
1988	3,012
1989	2,638

Source: General Motors, Western Auto

PASSENGER CARS IN USE

1980	104.6 million
1989	121.7 million

Average annual growth: 1.8%

LIGHT TRUCKS IN USE

1980	33.2 million
1989	50.2 million

Average annual growth: 5.7%

PERCENTAGE OF LIGHT TRUCKS AS VEHICLES IN USE

1980	24%
1989	29%

Source: General Motors, Western Auto

ket accessories and parts; a General Battery (now Exide), Reading, PA, study indicates that light truck owners account for 44% of all sales in auto parts stores.

And best of all, Wright also presented data from Uniroyal Goodrich, Akron, OH, that shows that roughly 25% of light trucks are still on the road after 20 years, compared with about 5% of passenger cars. "So the life of a truck is almost 20 years," Wright said.

To Get Into The Business

Wright told jobbers that only 70-75 SKUs in five key lines—bed liners, bug shields, running boards, pass-through windows, and tool boxes—are enough to be in the business. But, he noted, "We carry another 100 SKUs."

Wright presented a Western Auto study that ranked 28 stores on truck parts sales and measured variable factors. "We found that display size was the key distinction in why certain stores sold more light truck accessories than another. A 20-foot display will put you in business. You need to let people know you're in the business."

A second chart showed that once Western Auto began displaying light truck accessories in 24- to 44-foot displays, sales rose 22% and 37%.

Along these same lines, Western Auto spent time analyzing the success of various products in increasing store traffic and sales. The results of the study showed that motor oil was the best single product to advertise. However, light truck accessories were a strong number two, well ahead of other frequently advertised products.

Although Western Auto has service in all its company stores, Wright said the stores do very little truck accessory installation. "So installation is not the key. Could we sell more with installation? Yes. But could we make more money? No, with our limited bay space."

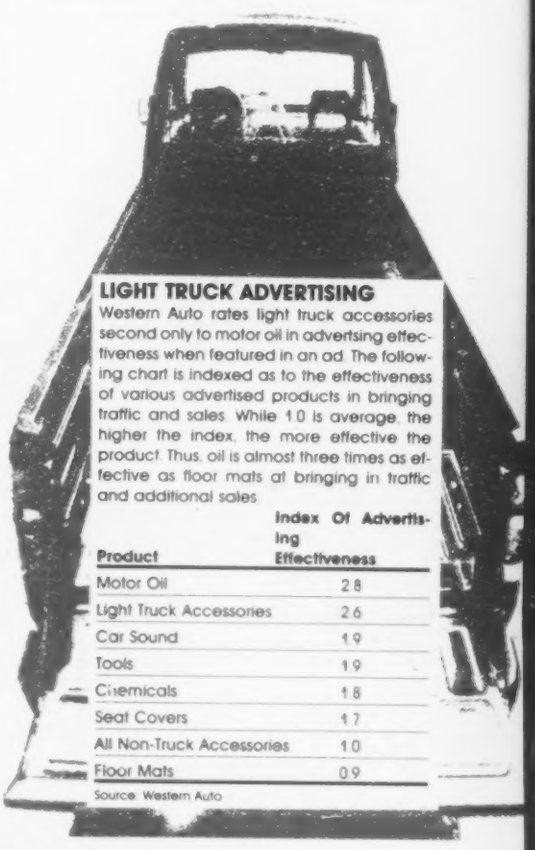
Others On The Truck Bandwagon

Marvin Almy, president of AAAD, Memphis, TN, which administers the 2,400 affiliated Parts Plus jobbers, noting the same growth in light truck sales, said it represented a major opportunity for Parts Plus to sell more accessories and replacement parts.

Among the various methods Parts Plus members use is that of Linkon Auto Supply, Centralia, IL, a retail/jobber chain that teams up with Arrow Speed Warehouse, Kansas City, to operate Performance Corners featuring light truck items among performance accessories.

Jobbers Warehouse, Grand Rapids, MI, also uses its own performance division to supply its jobber stores with a sales mix of light truck accessories. In addition, the performance warehouse also can give overnight service. The Muller Warehouse, Fort Worth, TX, is a traditional warehouse, Almy said, in a high truck population area. It is one of the few warehouses to provide its jobber customers with part number popularity guides and stock adjustment procedures to take advantage of the increasing light truck population.

Finally, Almy reviewed the Parts Inc., Memphis, TN, program. Parts Inc., is the

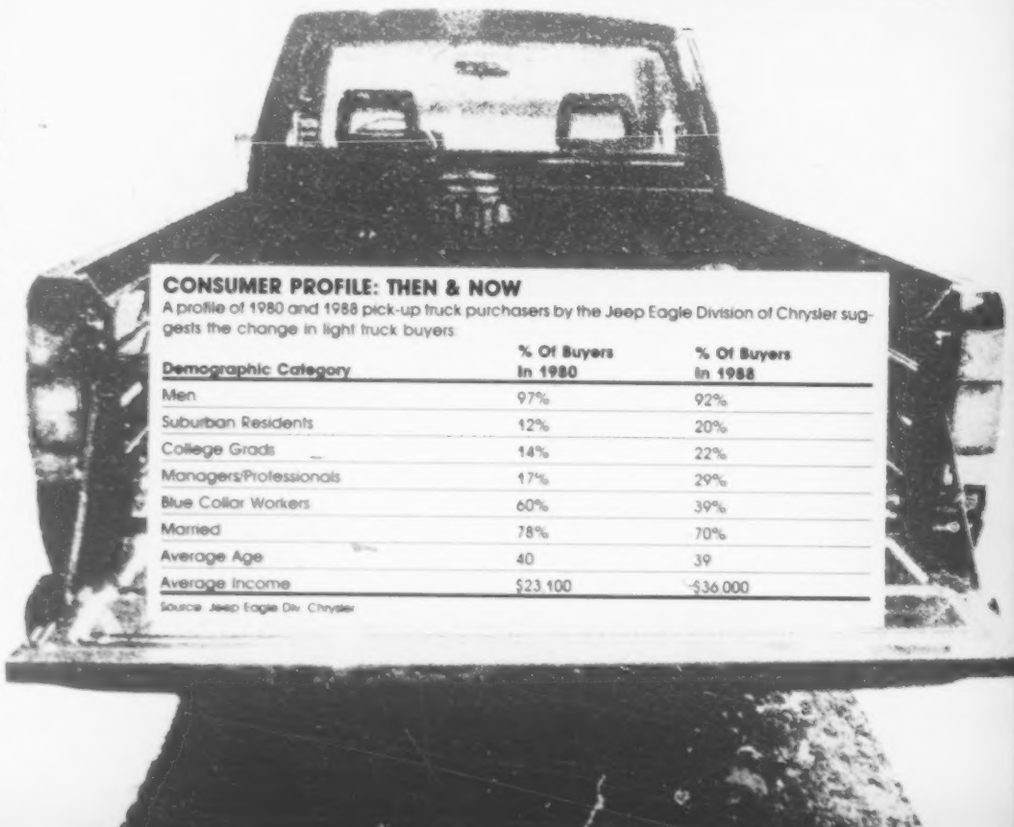


LIGHT TRUCK ADVERTISING

Western Auto rates light truck accessories second only to motor oil in advertsing effectiveness when featured in an ad. The following chart is indexed as to the effectiveness of various advertised products in bringing traffic and sales. While 1.0 is average, the higher the index, the more effective the product. Thus, oil is almost three times as effective as floor mats at bringing in traffic and additional sales.

Product	Index Of Advertising Effectiveness
Motor Oil	2.8
Light Truck Accessories	2.6
Car Sound	1.9
Tools	1.9
Chemicals	1.8
Seat Covers	1.7
All Non-Truck Accessories	1.0
Floor Mats	0.9

Source: Western Auto



CONSUMER PROFILE: THEN & NOW

A profile of 1980 and 1988 pick-up truck purchasers by the Jeep Eagle Division of Chrysler suggests the change in light truck buyers.

Demographic Category	% Of Buyers In 1980	% Of Buyers In 1988
Men	97%	92%
Suburban Residents	12%	20%
College Grads	14%	22%
Managers/Professionals	17%	29%
Blue Collar Workers	60%	39%
Married	78%	70%
Average Age	40	39
Average Income	$23,100	$36,000

Source: Jeep Eagle Div. Chrysler

WHAT DO TRUCK OWNERS PLAN TO BUY?

A survey of truck owners among 2,000 automotive enthusiasts by Burroughs & Associates, Nashville, TN, revealed that wheels and tires are number one planned purchase among truck owners.

Accessory	% Who Plan To Buy
Wheels & Tires	44%
Engine Performance Parts	31%
Lowering Kits	29%
Running Boards	29%
Aerodynamic Accessories	26%
Car Sound	26%
Graphic Kits	23%
Custom Paint	22%
Underhood Dress-Up Items	21%
Truck Bed Cover	21%
Mirrors, Grilles, Etc.	21%
Interior Dress-Up Items	20%

LEADING LIGHT TRUCK ITEMS AT WESTERN AUTO

1. Truck Bed Mats
2. Bug Deflectors
3. Running Boards
4. Pass-through Windows
5. Tool Boxes

Source: Burroughs & Associates, Nashville, TN; Western Auto

largest warehouse in Parts Plus. The warehouse provides store display arrangements and layout and planogram assistance to its company stores and jobber customers. Jobbers are required to have light truck items in all tabloid ads.

"Selling light truck parts and accessories doesn't require using any unique new techniques," Almy said, summing up. "We keep a close watch on inventory, make sure we do the right things, and know our customers needs."

A Simple Sell

The advice to retailers and jobbers from both Almy and Wright for selling light truck accessories boiled down to a few simple points. Make sure you have the products, show the products in the store, and let consumers know you have the products.

While the examples of the two manufacturers was not as immediately applicable to retailers, their experiences did go far to suggest the strength of the light truck market. Jim Pedranti, senior vice president at Sparkomatic-Kenco, Milford, PA, said that Sparkomatic saw a mature car sound market and "limited growth in the low medium end. The only growth was in the high end. Second, is the difficulty with DIY. In 32 1990 models, you can't replace the radio without working on the on-board electronics."

So Sparkomatic acquired Kenco and its line of light truck accessories in 1986. After a few changes in the Kenco line, such as adding a universal fit application to its bug deflectors, adding non-price sensitive items to its line, and boxing its bed liners, the company took the products through the same channels as Sparkomatic car sound equipment. "In effect, we folded Kenco into Sparkomatic and doubled our sales the first year."

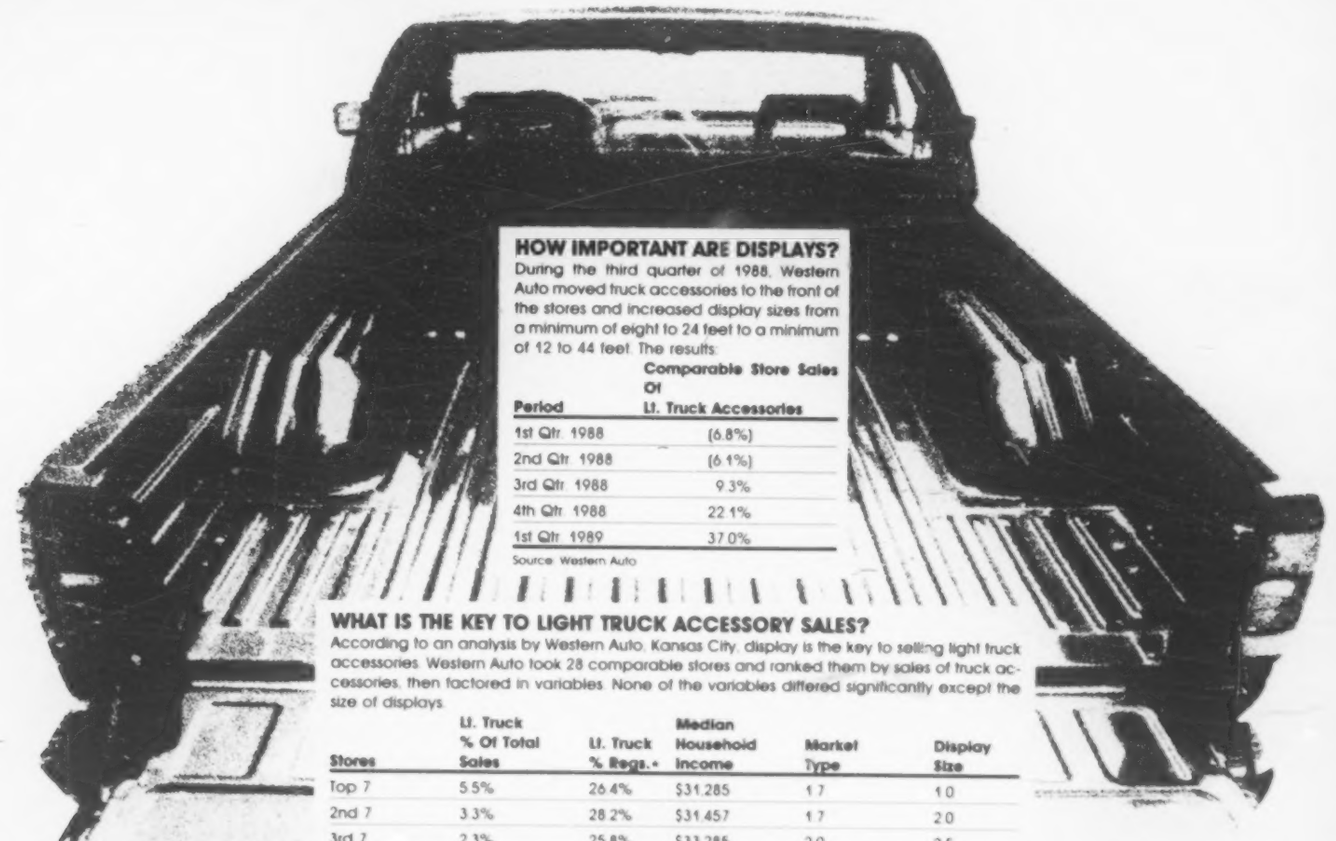
Special Products For A Special Market

At Monroe Auto Equipment, Monroe, MI, it was also the prospect of a flat market that drove Monroe to acquire Rancho Suspension, according to Ken Yoder, vice president of sales and marketing.

Although Rancho sells in a specialty market with total unit sales of about $1.9 million (less than 5% of the total ride control market), it places Monroe in the specialty shock market.

Yoder referred to the new market as undergoing "imploding growth. It's like bottled water with all its brands and flavors all selling bottled water. We have niche markets within niche markets."

Yoder suggested that Rancho's ability to respond quickly to changes in the market will aid Monroe, a mass marketer, with slower response time. ■



HOW IMPORTANT ARE DISPLAYS?

During the third quarter of 1988, Western Auto moved truck accessories to the front of the stores and increased display sizes from a minimum of eight to 24 feet to a minimum of 12 to 44 feet. The results:

Period	Comparable Store Sales Of Lt. Truck Accessories
1st Qtr. 1988	(6.8%)
2nd Qtr. 1988	(6.1%)
3rd Qtr. 1988	9.3%
4th Qtr. 1988	22.1%
1st Qtr. 1989	37.0%

Source: Western Auto

WHAT IS THE KEY TO LIGHT TRUCK ACCESSORY SALES?

According to an analysis by Western Auto, Kansas City, display is the key to selling light truck accessories. Western Auto took 28 comparable stores and ranked them by sales of truck accessories, then factored in variables. None of the variables differed significantly except the size of displays.

Stores	Lt. Truck % Of Total Sales	Lt. Truck % Regs.*	Median Household Income	Market Type	Display Size
Top 7	5.5%	26.4%	$31,285	1.7	1.0
2nd 7	3.3%	28.2%	$31,457	1.7	2.0
3rd 7	2.3%	25.8%	$33,285	2.0	2.5
Bottom 7	1.8%	24.0%	$36,142	1.4	2.3

Notes:
Market Type: 1 is suburban, 2 is rural, 3 is urban
Display Size: 1 is largest, 3 is smallest
*Registration
Source: Western Auto